



**70 Years
of Working to
Ensure the Future
and Vitality of
California Prunes**



Annual Update

Welcome to the annual, state-of-play update from the California Prune Board (CPB).

2022 marked the 70th anniversary of the organization. Our overarching vision is to create a world that is enthusiastic about California Prunes. We know that this enthusiasm starts with you and the generations of hard-working people who have and will power the California Prune industry's past, present, and future.

We invite you to spend time with this update learning more about how we are striving each day to make the vision a reality. Included on these pages are the strategies that shape CPB programs, along with data that provides a snapshot of the global dynamics, challenges, and opportunities at play for the California Prune business. The facts and figures provided in section 3 are prepared on a crop-year basis spanning August 1, 2021 – July 31, 2022 and include both current and historical information. This statistical content is compiled using processor's reports required by the State Marketing Order.

Based on guidance from the Executive Committee, Board, and program committees – and with thoughtful, strategic stewardship of the CPB resources – priorities are based on what matters most to the California Prune industry. With an eye toward the next 70 years and beyond, these programs aim to keep California as the largest and most reliable producer of prunes – all while inspiring a world that is, indeed, truly enthusiastic about California Prunes.



Table of Contents

01 ABOUT THE CALIFORNIA PRUNE INDUSTRY	10
CPB Election Year	12
Acreage Quantified	14
World Prune Production	15
Budget Allocation	16
02 HIGHLIGHTS FROM 2021/22	18
Nutrition Research	20
Crop Management & Sustainability	24
Government and Issues Management	28
Domestic & Export Marketing	32
03 FACTS & FIGURES	46
04 CALIFORNIA PRUNE BOARD RESOURCES	52
Resources	54
Contact Information	55



WANT TO LEARN MORE?

Scan the QR codes that are included throughout this report for a deeper dive to learn more.

A Message From The Executive Director

“As the industry makes the most of its current opportunities – while always looking to the future – I can’t help but place the importance of focus and integration at the top of today’s checklist.”

This year the CPB marks its 70th year of service to the industry.

The progress “checklist” during the past seven decades is substantial. We have dramatically expanded our global market presence; reaped the benefit of production research innovations that have helped make growing world-class California Prunes more productive, efficient, and sustainable; delivered remarkable nutrition research results in the areas of gut, bone, and heart health – and much more. These examples are testament to the vision, grit, and determination of generations of individuals committed to the collective success of it all.

Our strategic priority areas have the greatest potential to benefit our industry now and during the next 70 years of progress. These priorities help us remain laser-focused on the decisions and actions we take on your behalf. Going hand-in-hand with strategic focus is the importance of integration. Simply put – how

can we make the most of every endeavor that we undertake as an industry? How can we ensure that our nutrition research works hard for us in the strategic pillars of trade policy/market support and visibility expansion? How can we help unite the industry around the discoveries coming from our production research initiatives? These are part of regular conversations among our Committees, Board, Executive Committee, staff, and partners.

Throughout this update, you will see a variety of ways that we are providing answers to these types of questions. In particular, I invite you to take a look at the Government and Issues Management section on pages 28-31 for a deeper dive into the intersection of our strategic priority areas.

Here’s to the power of relentless focus, smart integration, and a never-ending commitment to progress.

Here’s to California Prunes. *For Life.*



DONN ZEA
EXECUTIVE DIRECTOR

Mission

Unite growers and packers to drive essential activities that support the California Prune industry.

Vision

A world enthusiastic about California Prunes.

Purpose

Promote lifetime wellness through the enjoyment of California Prunes.

Strategic Priorities

NUTRITION RESEARCH

Expanding our understanding of health benefits

EXPANDING VISIBILITY

Global marketing and public relations

UNIFIED INDUSTRY

Expanding involvement, improving connections, sharing value

TRADE POLICY & MARKET SUPPORT

Government purchases, ATP/MAP funding, trade relations

PRODUCTION RESEARCH

Lowering costs, improving California Prune quality, protecting investments

A Message From The Chairman

In many ways, I believe the longevity of an organization is closely linked to the diverse skills of the people in it. I've seen this in my own family's business as each generation considers the demands and challenges they face, the opportunities to innovate, and determines the legacy that they want to leave behind.

I see similar dynamics in the CPB as it marked the 70th anniversary.

No one will deny the challenges that our industry continues to face. The rising cost of growing and processing California Prunes, as well as the battle for land and water is not going away. The growing competition from international markets and industry consolidation in our own backyard is the reality that we, as California Prune growers and handlers, are all too familiar with.

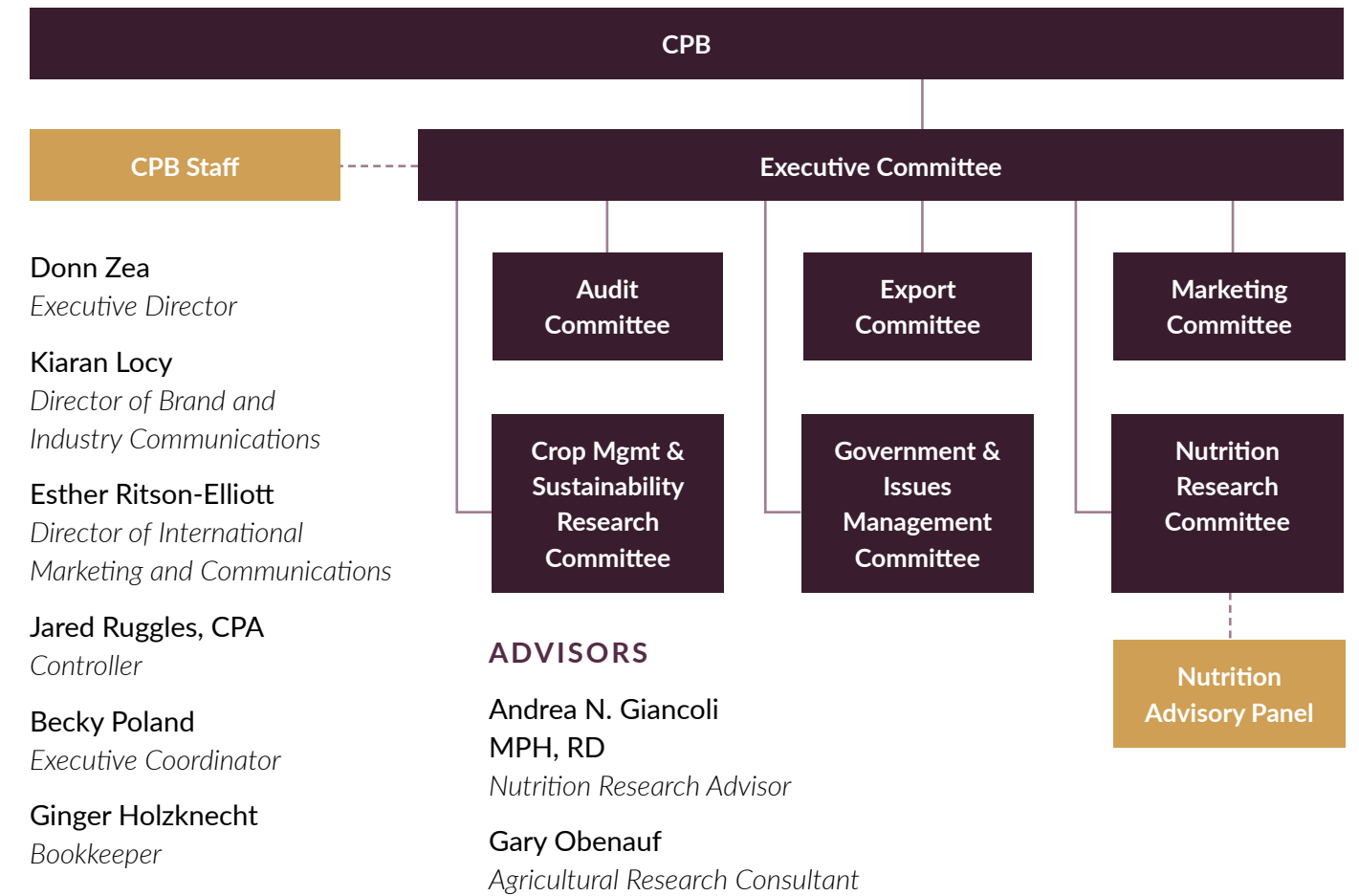
Yet, we produce a great product that enhances the health of people of all ages. We have excellent nutrition research projects that have been completed and more that are underway. These studies have the potential to elevate and differentiate California Prunes in the marketplace - ultimately helping to drive consumption. Additionally, we remain steadfast in our commitment to production research and the findings that help us to work more efficiently and effectively.

As an industry, we've navigated many ups and downs, embracing the power of cooperation, transparent dialogue, and strategic planning. Today's level of sharing among the Executive Committee ensures we have pertinent information that allows everyone to make good decisions. Those in leadership roles on the Board and within committees make decisions in the best interest of the industry - not just for their individual businesses. This collaboration allows us to focus on our collective goals.

As an organizational entity, the CPB, Executive Committee, specialized committees, and staff have a solidified structure that operates like a well-run small business. We have a team of motivated people that functions as one - working together, sharing strategies, and involving everyone in the process. Through sound financial stewardship, we are managing our budgets in shorter crop years in ways that allow us to continue investing in research and public relations. We are tenacious about securing grants and matching funds that help support the marketing efforts of California Prunes worldwide.

It is for these reasons that I'm proud to be a part of this industry and carry a disciplined hope for our collective future. As we embark on the next 70 years, let's remember all the positive momentum that has brought us to where we are now.

Board Structure



"Let's keep the dialogue going and continue the hard work."

GEORGE SOUSA JR.
CHAIRMAN OF THE CALIFORNIA PRUNE BOARD

George Sousa Jr.

Our Values (Principles that drive our decisions)

EMBRACE CHALLENGE AND CHANGE

ENGAGE IN RESPECTFUL DIALOGUE

OPERATE WITH INTEGRITY

COMMIT TO PRUNE QUALITY AND CONTINUOUS IMPROVEMENT

SERVE OUR STAKEHOLDERS

Historical Timeline

In 2022, the CPB marked 7 decades of service to the California Prune industry. Here are some of the notable industry and CPB highlights from over the years.

1950s + 1960s

★ 1952:
The State Marketing Order for California Prunes was established. Proactive marketing and promotional efforts begin. Production Research is launched

★ 1960:
The epicenter of California Prune production shifts to the Sacramento Valley from the modern day "Silicon Valley"

1980s

★ CPB reinstates public relations & generic TV advertising

★ 1981:
"Today's Prunes" television advertising. "Proud Prune" commercial

1990s

★ 1983:
"New Mom's Survival Guide" developed for prune juice

★ 1985:
A Varietal Selection Program is implemented to breed new selections of prunes led by UC Davis researchers

★ 1989:
California Prune Festival launched

★ 1990:
CPB office moved from San Francisco to Pleasanton, California

★ 1993:
First International Prune Association (IPA) Conference held in Yuba City

★ 1997:
Nutrition Advisory Panel (NAP) established, to shepherd the nutrition research program

2000s

★ 1998:
Baby Boomers selected as new target audience and new campaign debuts touting prunes as "The Energy Packed Super Snack"

★ 1999:
Consumer PR focus shifts to discovering the goodness/nutrition of prunes

★ 2000:
California Prunes changes name to "Dried Plums" to refocus image for consumers

★ 2001:
CPB office moves to Sacramento, California

★ 2003:
"Plums of Wisdom" magazine advertising campaign targeted to women ages 25-49 who want to make better snacking choices

★ 2004:
Domestic advertising suspended; public relations focuses on digestive health

Today's milestones

★ 2017:
NY Times Magazine publishes "In Praise of the Prune" feature article

★ 2019:
New California Prunes brand and tagline introduced: California Prunes. *Prunes. For Life.* California Prunes have earned a premium reputation in global markets

★ 2021:
California Prunes Nutrition Research Roadmap developed

★ 2021:
California Prune growers and handlers generate more than \$717 million in economic impact each year, Economic Impact Study finds

★ 2022:
The largest clinical trial to date investigating the "prune effect" on bone health is released by Mary Jane De Souza, Ph.D., Pennsylvania State University

★ 2022:
CPB marks 70th anniversary

Section 1:

ABOUT THE CALIFORNIA PRUNE INDUSTRY

**CHAIR
(RE-ELECTED)**
George Sousa Jr.
President of Mariani
Packing Co. Inc.
Vacaville, Calif.

**VICE CHAIR
(NEWLY ELECTED)**
Mike Vereschagin
Vereschagin Farms
Orland, Calif.

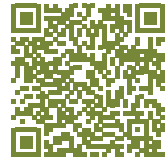
**SECRETARY
(RE-ELECTED)**
Dan Bozzo
Triple B Ranch
Gridley, Calif.

**TREASURER
(RE-ELECTED)**
Rajeev Davit
Davit Ranches
Yuba City, Calif.

CPB Election Year

Industry Veteran and President of Mariani Packing, George Sousa Jr., to continue serving as Board Chair.

The CPB officially seated its 22-member board and 15 alternates for the 2022-2024 term. The officers listed to the left were unanimously nominated and elected by their colleagues.



Scan to access the complete list of Board members.

ABOUT THE PRUNE MARKETING COMMITTEE

The Prune Marketing Committee (PMC) was formerly an organization to oversee inspections and regulatory factors. It is now deregulated and reserved for future opportunities should growers and handlers need it.

"Our values as a Board keep us driven towards quality and continuous improvement and I'm honored to continue serving as Board chairman alongside dedicated individuals who share a vision of creating a world more enthusiastic about California Prunes."

— George Sousa Jr., President, Mariani Packing Co.

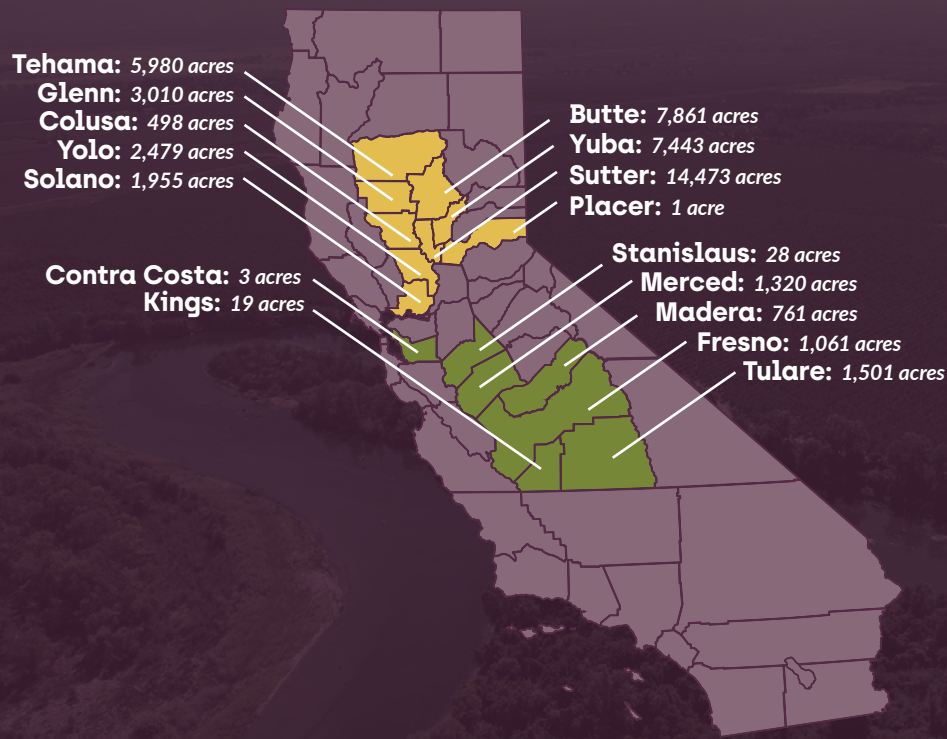
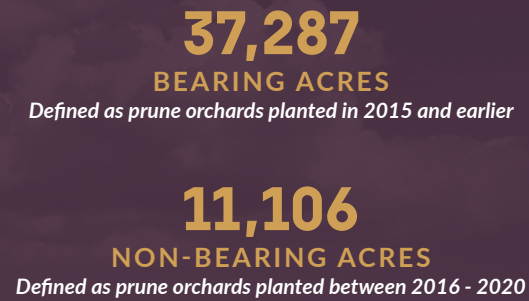
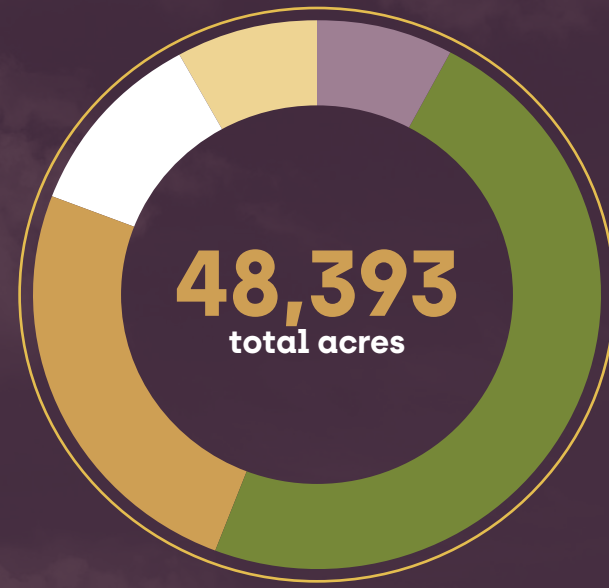
<p>70 YEARS</p> <p>For 70 years, the CPB has served as an instrumentality of the California Department of Food and Agriculture (CDFA)</p>	<p>27 HANDLERS</p> <p>27 handlers process California Prunes, juice and ingredients</p>	<p>\$160 MILLION</p> <p>The farm gate value of the California Prune crop is roughly \$160 million each year</p>
<p>600 GROWERS</p> <p>600 growers make up the California Prune industry</p>	<p>\$717 MILLION</p> <p>The economic impact California prune growers and handlers generate \$717 million each year</p>	 <p>California is largest producer of prunes in the world</p>
 <p>California grows 99% of the U.S. total prune supply and 40% of the world's supply</p>	 <p>14 counties 2 growing regions</p>	<p>#1 DESTINATION</p> <p>The U.S. is the top destination for California Prunes</p>

Scan to get the complete economic impact study



Acreage Quantified

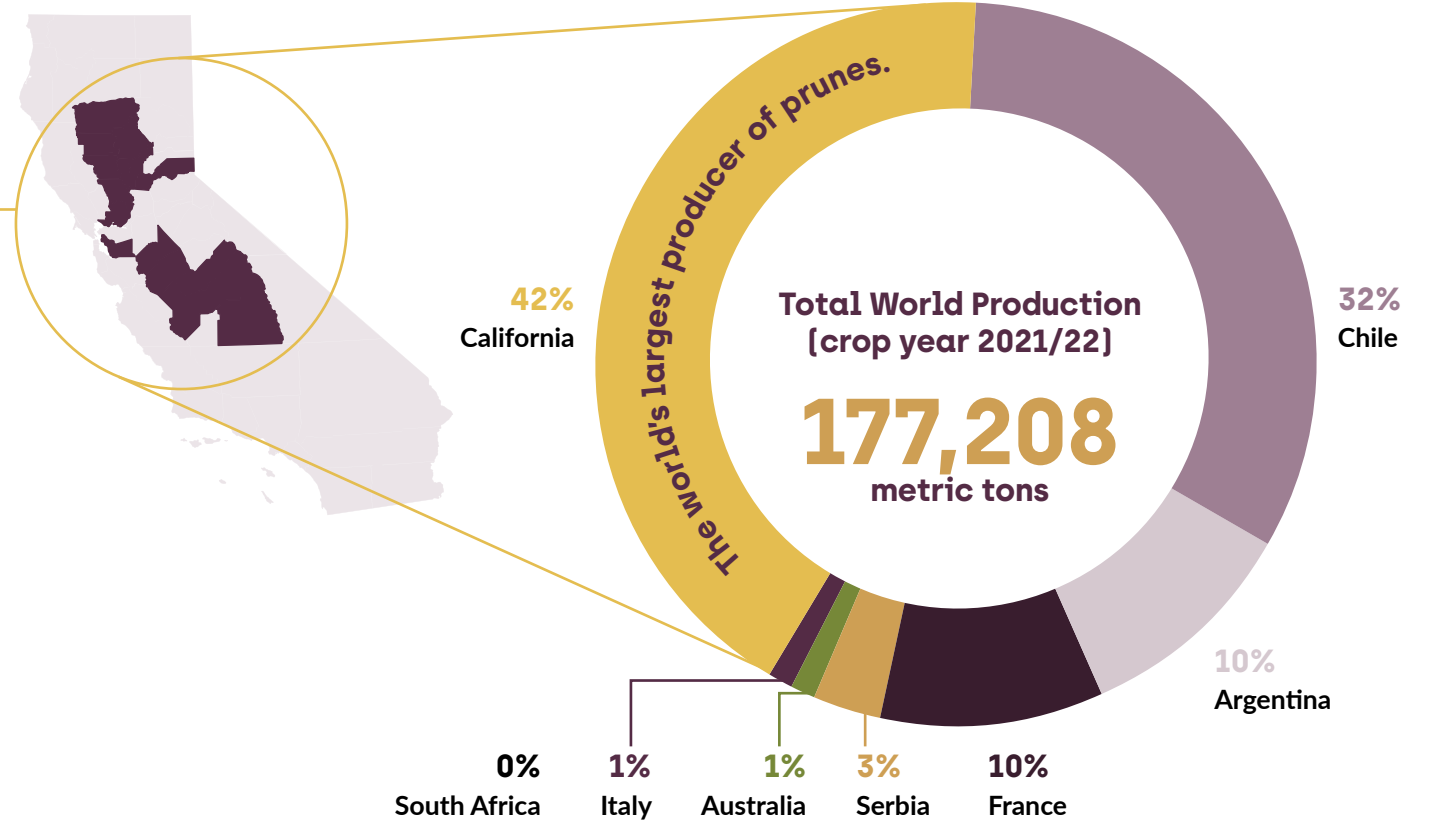
To better quantify the information collected through industry reporting about bearing and non-bearing acreage and location, the CPB retained Land IQ to conduct an update of its 2014 prune acreage mapping. Land IQ uses a combination of Department of Water Resources statewide land use data, advanced remote sensing analytics and extensive ground truthing, all with an estimated accuracy level exceeding 96%. The update shows that the 2020 total California prune industry includes →



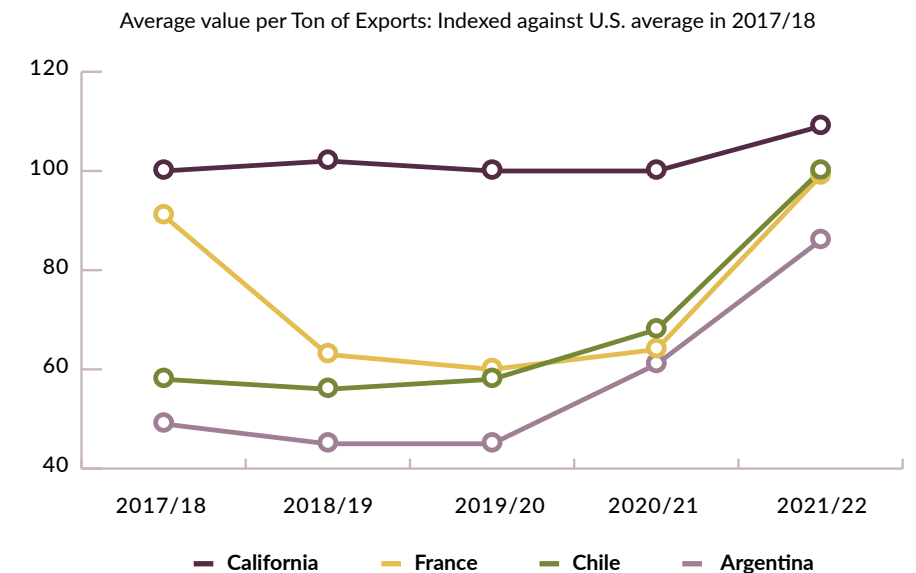
"We must stay competitive with other prune producers around the world and compete with other commodities for acreage here at home."

- Gary Obenauf, Agriculture Consultant and Program Coordinator

World Prune Production



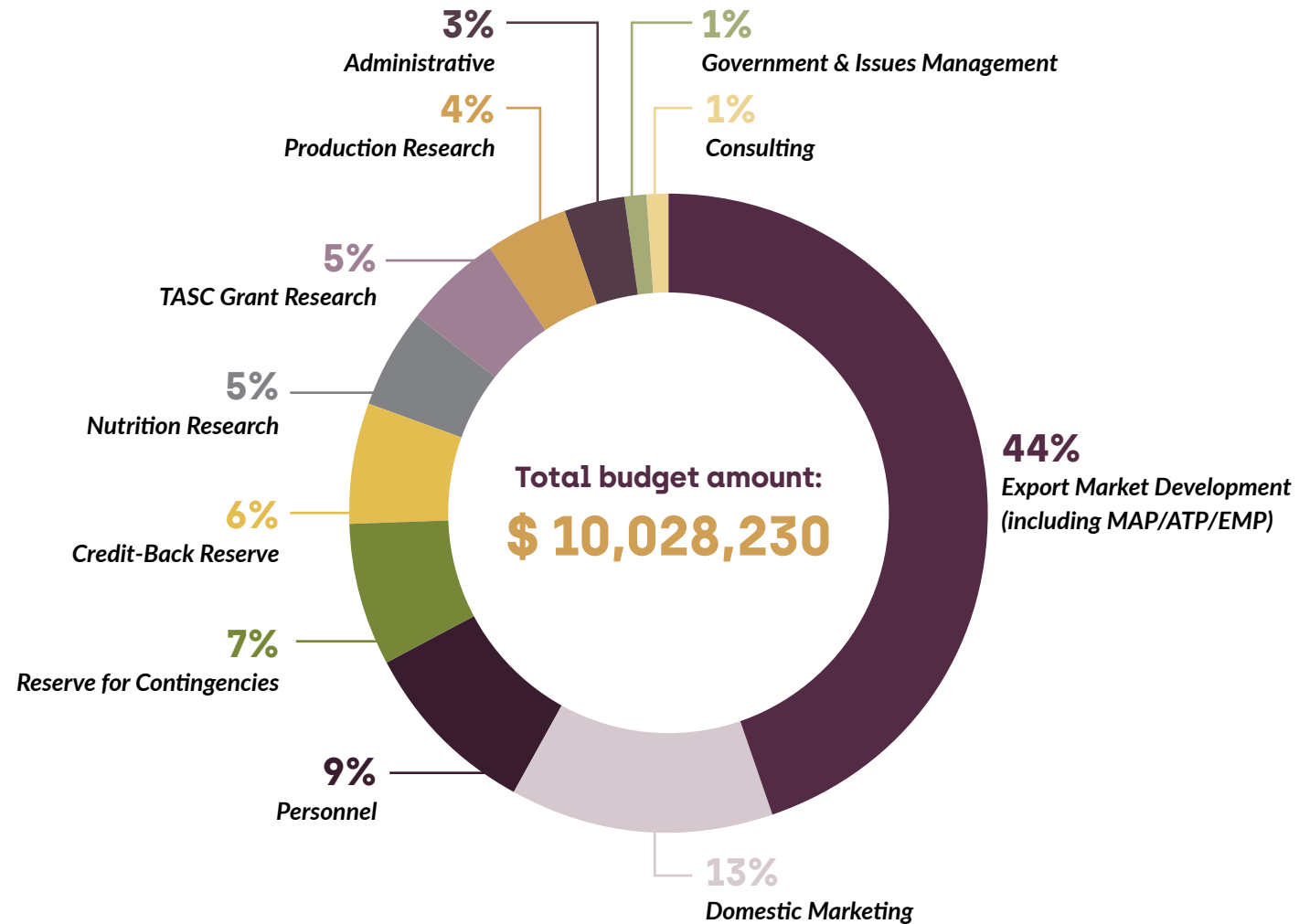
California maintained **10%** premium value over competition



Source: TDM EXPORTS, year ending July. All averages are indexed against the base value of U.S. Average Value per Metric Ton in 2017/18 which was \$3,929.

Budget Allocation

The enclosed financial information provides an overview of the 2021/22 budget allocations as established and overseen by the individual Committees and the entire CPB.



"As a member of the Audit Committee, I have complete trust in the Prune Board and their handling of grower/packer assessments and federal funding. This assurance comes from seeing 'clean' audits year after year."

— Matt Bozzo, California Prune Grower, Triple B Ranch, and Audit Committee Member

Actual Financial Results

Assessment Income	\$6,269,193
Generic Market Access Program	\$2,298,911
TASC Grant Income	\$505,467
Generic Agricultural Trade Promotion Program	\$30,405
Other Income	\$3,466
TOTAL INCOME	\$9,107,442

Export Market Development	\$3,704,684
Domestic Marketing	\$1,254,478
Personnel	\$945,700
TASC Grant Research	\$505,467
Credit-Back	\$483,102
Production Research	\$395,066
Nutrition Research	\$342,535
Administrative	\$290,578
Government & Issues Management	\$114,178
Consulting	\$85,878

TOTAL EXPENDITURES \$8,121,666

Beginning Balance of Funds \$710,534

ENDING BALANCE OF FUNDS \$1,696,310

Section 2:

HIGHLIGHTS FROM 2021/22

Nutrition Research

SCIENTIFIC EVIDENCE FOR THE HEALTH HALO OF CA PRUNES

For 25 years, CPB has invested in nutrition research shepherded by the Nutrition Advisory Panel to provide sound scientific evidence for the health benefits of prunes. With a focus on research in gut, heart, and bone, we have taken on significant research in the area of bone health as a growing body of evidence shows that prunes are considered a promising functional food for maintaining healthy bones.

This year marked a major milestone for nutrition research programs in multiple ways. The staff and committees worked closely with experts in their fields to establish a Nutrition Research Roadmap – a 10-year strategic plan for nutrition research that is designed to expand the evidence about prunes and healthy bones and identify a gateway to what’s known as the gut-bone axis or connection. The Roadmap contains several research recommendations that are intended to:

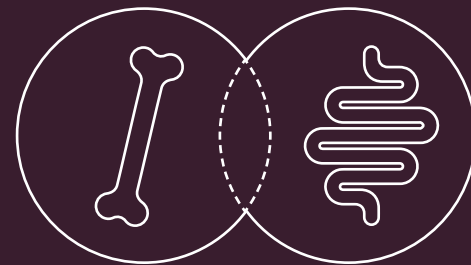
- Improve the cadence of our communications so that there is research being published and communicated at least yearly.
- Address research gaps in varying demographics. We’ve done a lot of research on postmenopausal women so we’re branching out to other populations.
- Consider global/regional needs by initiating research outside of the U.S. We want to make sure we’re serving other markets and countries with different diets and cultural behaviors unlike that in the U.S.
- Take a life stage approach that integrates our brand tagline Prunes. For Life.

Two Key Areas of Focus



1) FOCUS ON BONE

Expand the evidence about prunes and healthy bones, addressing the gaps from the current body of evidence.



2) EXPLORE GUT-BONE CONNECTION

Identify a gateway to the gut-bone axis potentially through California Prunes’ prebiotic and anti-inflammatory activity



NEW RESEARCH PROVIDES THE EVIDENCE THAT SUPPORTS PRUNES AS A PREBIOTIC FOOD

In an animal study published April 2022 revealed the prune polyphenols and carbohydrates found to have prebiotic power that supports bones.

THE PRUNE STUDY; A LANDMARK STUDY

Prunes preserve hip bone mineral density in a 12-month randomized controlled trial in postmenopausal women.

In our largest clinical trial to date, the Prune Study involved 235 women and was the first to demonstrate a favorable effect on both BMD and fracture risk at the hip.

The first paper to be published in the study focused on the primary bone outcomes and was published in July in the American Journal of Clinical Nutrition.

The study found that just 5-6 prunes a day preserves bone mineral density and prevented increased fracture risk at the hip in postmenopausal women, a common site of debilitating fractures in the ageing population.

With five more papers anticipated from this study to be published in peer-reviewed journals, the global marketing team is taking every opportunity to communicate the findings while Dr. De Souza presents her research through abstracts, posters and presentations to the scientific community.



*Principal Investigator:
Mary Jane De Souza, Pennsylvania State University*

70 Years of Service ... Nutrition Research

- ★ **1997:** Nutrition Advisory Panel (NAP) established and CPB embarks on bone health research
- ★ **2001:** Published research reports prunes prevented bone loss in estrogen deficient female rat model
- ★ **2002:** Human study: Prunes found to improve markers of bone formation in postmenopausal women
- ★ **2010:** Published research finds prunes increase bone mass in male mice
- ★ **2011:** British Journal of Nutrition publishes findings revealing prunes increased bone mineral density and decreased markers of bone turnover in postmenopausal women compared to dried apple
- ★ **2016:** Animal research published suggests dried plums may protect astronaut’s bones from radiation damage; gains national headlines
- ★ **2021:** California Prunes Nutrition Research Roadmap developed
- ★ **2021:** Prunes reported to have a protective effect on bone health in men 50+
- ★ **2022:** The Prune Study is published, the largest clinical trial to date on prunes, and reports 1 year of daily consumption of 50 g of prunes preserved hip bone mineral density in postmenopausal women

Mary Jo Feeney: A Sincere Thank You and Fond Farewell

It is rare that an organization has the opportunity to glean the knowledge and perspective of someone as impactful as our Nutrition Advisor, Mary Jo Feeney, MS, RDN, FADA, FAND – particularly over a span of 25 years. Mary Jo was instrumental from the very first day helping guide California Prune growers and handlers in their journey of nutrition discovery and manage the many moving parts of such a program, including coordination with the Nutrition Advisory Panel (NAP), researchers, industry, and staff. Her contributions are numerous and far-reaching and have been critical in helping us arrive at where we are today with our nutrition research program. Mary Jo's expertise, wisdom, and not-to-mention kindness and collaborative spirit, will truly be missed. With deep gratitude for her service and dedication to California Prunes, we wish Mary Jo all the best in her future endeavors.



MARY JO FEENEY
MS, RDN, FADA, FAND
NUTRITION RESEARCH CONSULTANT

PERSPECTIVES FROM MARY JO...

As she reflects on her decades of nutrition leadership on behalf of the industry, Mary Jo was asked what has impacted her the most in working with the CPB. Her response is summed up in the three "C's", including:

- **Commitment.** The industry's commitment to nutrition research – which is about discovery without guarantees.
- **Credibility.** The NAP's dedication to scientific rigor has resulted in a credible research portfolio supporting communications to healthcare professionals and consumers.
- **Colleagues.** The opportunity to learn more about the person behind the investigator, scientist, NAP member or industry representative.

Impactful, indeed, Mary Jo ... just like you.

"The industry's commitment to nutrition research – which has no guarantees – has made the biggest impact on me during my time working with the Board."

– Mary Jo Feeney, MS, RDN, FADA, FAND

Andrea Giancoli: A Warm Welcome and Excitement for What Lies Ahead

As for our future, we are in very good hands with our new Nutrition Advisor, Andrea Giancoli, MPH, RD. To help with the transition, Andrea has worked alongside Mary Jo for more than a year in the coordination of the CPB's Nutrition Research Program. She was instrumental in the development of the Nutrition Research Roadmap and led the Roadmap recommendation process with the Nutrition Research Committee. She has more than 20 years of experience as a registered dietitian and a special passion for helping to guide research efforts, and in turn, interpret the findings in a way that is meaningful for healthcare professionals and consumers alike. On behalf of the Board and NAP, we welcome Andrea as we continue to learn more about California Prunes and their functional benefits in the areas of bone and gut health and the axis of both.



ANDREA N. GIANCOLI
MPH, RD
NUTRITION RESEARCH
ADVISOR

BONE HEALTH: UNCOVERING THE WONDERS OF CALIFORNIA PRUNES

Ever wonder how or why California Prunes began exploring the connection between California Prunes and bone health?

Turns out the connection was born out of scientific curiosity and observation of unique nutrient content, as highlighted in an excerpt from Nutrition Journal Today – as shared by the late Phyllis E. Bowen, PhD, RD, Professor Emerita of Kinesiology and Nutrition at the University of Illinois – Chicago.

As I took on the role as Nutrition Advisory Panel (NAP) member for the California Dried Plum Board (CDPB), I noticed that dried plum had an unusually high boron content. I remembered that boron had been associated with strengthening bones in some early animal studies. A young faculty member, Bahram Arjmandi, in my department at the University of Illinois at Chicago had a model for ovariectomized animals to simulate osteoporosis, so I suggested that he put in a proposal to study dried plums with his animal model. The NAP advised the CDPB that the proposal was low cost and scientifically worthwhile and CDPB funded the animal project although there was no previous evidence of a dried plum bone connection. To Arjmandi's surprise and ours, the dried plum treated ovariectomized rats (a good model for post-menopausal osteoporosis) experienced less bone loss than their counterparts.

Dr. Bowen's observation – and willingness to act on it – set into motion decades of research that have and continue draw remarkable findings related to the "prune effect" on favorable bone health. In many ways, we are just getting started as we consider the amazing potential for future research into bone health, as well as the gut-bone axis and what research may reveal about that connection.

Crop Management & Sustainability

Guided by the needs of our growers, the CPB's production research is strategically managed and funded through the oversight of the Crop Management and Sustainability Research Committee and remains a vital part of our purpose, to "promote a lifetime of wellness through the enjoyment of California Prunes".

Since 1972, the Board's commitment to research has guided a total of \$11.7 million to fund our industry with an effective understanding of disease and pest problems and advance cost-effective methods for producing premium California Prunes that support today's complex pressures. While current challenges – from water limitations and climate unpredictability to labor costs and other issues – impact profitability, the investment in research and partnerships with leading universities and experts supports sustainable advancements and ensures that our industry remains a global premium prune producer.

CPB-FUNDED RESEARCH WITH STRATEGIC INVESTMENTS IS DIRECTED TOWARD:

 <p><i>Decreasing production costs</i></p>	 <p><i>Improving prune size and quality</i></p>	 <p><i>Improving worker safety and labor costs</i></p>
 <p><i>Improving dehydration or processing efficiency</i></p>	 <p><i>Offering more environmentally friendly alternatives to current materials</i></p>	 <p><i>Improving consistent year-to-year production</i></p>



Can Mechanical Pruning Lower Costs?

California is known for its large, high-quality fruit and staying competitive in the global prune market means addressing the need to find lower-cost pruning alternatives for growers without compromising yield or fruit quality.

While work continues at the mechanical pruning trial site in Red Bluff, the CPB hosted University of California Cooperative Extension researchers, and representatives from the olive, cherry, and pistachio industries to understand how mechanical applications are impacting the production of other commodities and what is working best.

Key takeaways from the meeting:

- *Mechanical pruning provides reduced labor for pruning*
- *Cost savings are significant, at least in the short run*
- *New pruning methods work best if you start with a first leaf to set up the tree correctly*

Mechanical pruning research led by Dr. Rich Rosecrance at Chico State, was initiated in 2019, and is investigating the long-term effects of cost, disease development, the life of orchards, fruit quality, and size among other impacts. While several industry members are implementing some mechanical pruning, more scientific research in paired comparisons of different pruning methods is needed before this practice is adopted industry-wide.

70 Years of Service ... Production Research

- ★ **1952:** Production Research program is launched
- ★ **1970:** Reference date established to assess pit hardening allowing growers to know when they should consider thinning
- ★ **1975:** Fruit Thinning research begins on prunes to determine success with size and quality of fruit
- ★ **1980:** Research on sizing chains for harvesters assesses cost of leaving small fruit in the field vs. drying low-value fruit, now a widely adopted practice for excess fruit at harvest
- ★ **1985:** A Varietal Selection Program is implemented to breed new selections of prunes, led by UC Davis researchers
- ★ **1995:** Development of Integrated Prune Farming Practices centered around IPM providing the tools to know when and how to control pests with the least environmental impact
- ★ **2008:** Research on managing heat at bloom began providing new insights into water management needs during bloom and how weather before bloom effects the bloom period
- ★ **2020:** TASC Program on Sulfuryl Fluoride commences allowing the industry to update regulatory use patterns associated with non-tariff barriers to exports plus scrubbing methods to prevent exhaust into the atmosphere

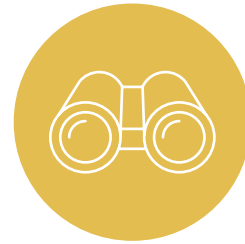
Breeding the Future of our Industry

The California Prune Board has invested more than \$2.5 million dollars into breeding new varieties of prunes since the cultivar development program began in 1985 in partnership with UC Davis researchers. The importance of this research helps address the risk of dependency on a monoculture, as unpredictable weather, diseases, and insects may have deeper impacts to future crops.



A More Sustainable Prune

Improving the way we grow prunes is foundational to a healthy industry for years to come and remains a core part of all production research. With approved funding to continue the breeding program, new and superior varieties such as “Yolo Gold” have many of the characteristics needed to reduce labor costs, produce better fruit quality, and provide more resistance to diseases. The most promising varieties offer growers varying bloom times and harvest dates that extend the harvest season and make orchard management more efficient. Next generation growers will require crops with these characteristics to remain profitable and relevant.



The Road Ahead

Each year, the Crop Management & Sustainability Research Committee and UC Davis researchers further analyze and select the best fruit to “graduate” to the next step in the varietal development process. The CPB is now managing a program to support growers who are willing to commit to planting up to 10 acres of the top selections. This process will allow further analysis and provide certainty of scaling as we develop the next commercially viable premium prune.

“Having a new cultivar with a lower dry-away ratio is a great way of not only saving our growers money but reducing our environmental impact as an industry because it saves us drying time and lessens our use of natural gas.”

— Sarah Bradley Castro, UC Davis, Prune Breeding Program

A Closer Look at Sustainability

For those involved in agriculture, we know that sustainability is not a trend or fad, but rather a way of life – literally cultivated year after year, decade after decade. When the world is talking about “sustainability” growers are thinking about efficiency just as they have for over 100 years.

While sustainable farming is as unique as the diverse family farms that make up the California Prune industry, together we are committed to continual progress. Our history proves that growers have been cultivating responsible, safe, and environmentally friendly practices for the land they steward, the people they employ, the markets they feed, and the communities where they reside for generations. Under robust regulations, changing dynamics in climate, farming, and the global marketplace, sustainability is ultimately about the California Difference so that we can consistently produce a premium product that reaches over 60 countries every year.

THE CALIFORNIA DIFFERENCE SETS OUR BRAND APART

- Flavor, Quality, Consistency, Size
- Environmental and socially responsible production practices
- Respect associated with California as a premier, global growing region
- An all-around premium reputation earned over the years

Government and Issues Management

AN INTERSECTION OF STRATEGIC PRIORITIES

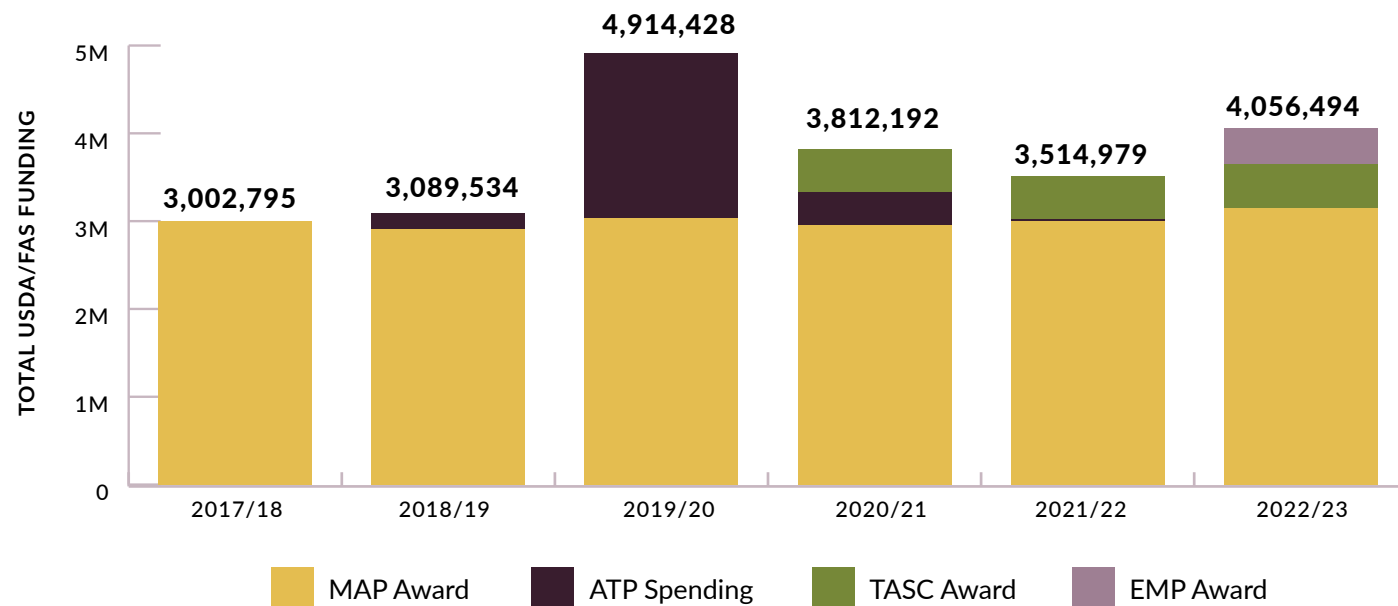
As a California marketing order, the CPB has a narrow, but critical scope when it comes to state and federal government communications. Our role is to educate and inform government about how policies can affect prune growers and handlers and to support programs that support the industry. Through these efforts, each of our Strategic Plan priorities are in some way affected in a way that delivers value to the industry. Oversight of these issues rests with the Executive and Government & Issues Management Committee before coming to the full Board. Here are just a few examples of how government communications played a role this year:

Much of the horsepower behind the CPB's international marketing engine is the long-standing relationship with the Foreign Agricultural Service (FAS) and our hard-earned success in receiving Market Development and Market Access funding, totaling \$3.5 million in the 2021/22 year.

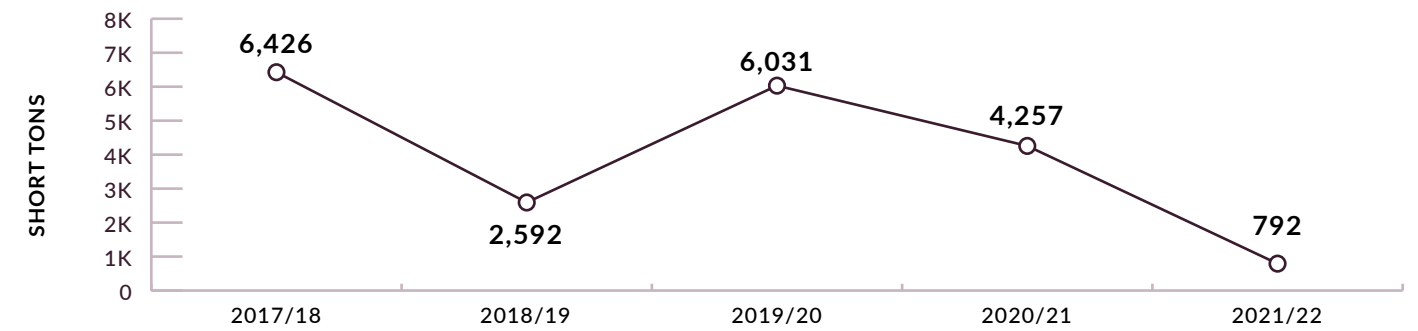
This annual commitment to marketing and promotion – matched with industry funding – buoyed volume and value increases in key markets and continued to set apart California Prunes as the industry leader in a year where short global supplies left the trade with fewer choices. Coupled with the trending desire of consumers to eat more healthy foods, California Prune exports rose

32% in volume and 29% in value year-over-year in markets where promotion dollars were spent, contributing directly to CPB's strategic pillar of Expanding Visibility.

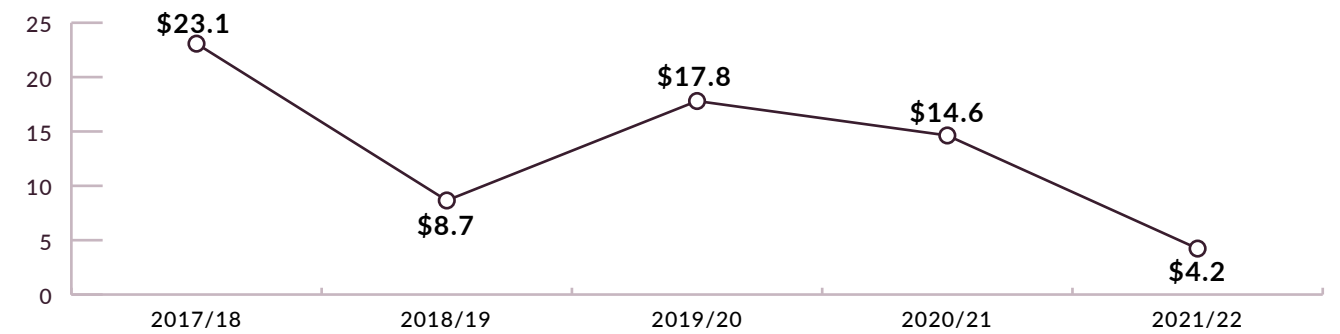
Our commitment to this partnership in export promotion was again recognized by FAS in awarding the CPB its highest rating for performance and stewardship of financial resources. We work year-round to ensure that lawmakers in Washington, D.C. recognize that the value of these trade programs are essential to the success of California Prune growers and handlers. We are already working to make the case for doubling market promotion and research funding in the 2023 Farm Bill.



USDA Purchases Short Tons



USDA Purchases \$



Trade policy continues to be a point of frustration for all of U.S. agriculture. Key trade appointments at the USDA and USTR are still unconfirmed at the time of this writing, and the current Administration is promoting an overarching policy that downplays tariffs as a priority in trade negotiations.

We continue to communicate our position concerning the impact of punitive tariffs on California Prunes and are working with agricultural coalitions to convey our collective concerns about evening the playing field through free and fair-trade deals.

Our strong relationship as a supplier of nutritious California Prunes to the USDA for school and other food programs continues to make available valuable tools to manage inventory while introducing our product to a new generation of

consumers. Whether setting in motion a Section 32 purchase during a period of oversupply or having the opportunity to bid on smaller, intermittent offers, the CPB places considerable importance on its relationship with the Agricultural Marketing Service and Food and Nutrition Service and reports market conditions to them regularly for planning purposes.

Due to tightening supply and robust market conditions, USDA purchases in 2021/22 were 792 short tons valued at \$4.2 million.

Other priority issues covered by CPB this year included: Supply chain and shipping disruptions (Ocean Shipping Reform Act); China Processing Facilities Registration – Decree 248; Sustainability/Climate issues; energy and overall input costs.

Advances in knowledge about the health benefits of prunes directly influences our credibility with the Agricultural Marketing Service, Food and Nutrition Service, and the Food and Drug Administration - all key players responsible for decision-making about food purchases, dietary guidelines, food labeling, and sustainability. Our 10-year Nutrition Research Roadmap provides a platform from which we can make an impactful case to policymakers and charts a course for making California Prunes relevant in national food and nutrition policy discussions.

Input costs, water availability, chemical restrictions, labor, and climate-related initiatives remain challenging to grower and handler profitability. Crop management and sustainability research seek to provide innovative tools and improved knowledge to fuel competitiveness in response to lower-cost prune producing countries and encroachment of government policies. Active leadership in this area positions the industry as key players in the discussions in Sacramento and Washington, D.C. and improves our competitiveness in securing funding such as the \$1.46 million Technical Assistance for Specialty Crops grant (TASC) awarded to the CPB to facilitate research in support of continued use of Sulfuryl Fluoride in the EU.

A summary of our production research work was compiled into a well-received sustainability update that we shared during a Board visit to Washington, D.C. this past spring. The CPB Production Research investment is certain to play an increasingly vital role, as attempts to quantify and incentivize carbon sequestration and “climate friendly” agriculture continue.



Scan to access the Board's Sustainability efforts.

California Specialty Crops Council's Ag Outreach Tour

This summer, the 20th annual California Specialty Crops Council's Ag Outreach Tour returned bringing 42 attendees from organizations including the EPA, USDA, EPR and more giving an on-the-ground look at crops and what science in the field is providing to growers. Agencies represented on the tour included US EPA, USDA (including FAS, AMS, RMA, ARS, and APHIS), US FDA, CDPR, CAL EPA, CDFA, SWCB, IR-4 Project, UC-ANR and UC-IPM.

“It was chalk full of great insight/information and provided a good view into the complexities, challenges, innovations and necessary cooperation in CA's agricultural sector.”

— Clare R. Mendelsohn, Deputy Secretary for Public Policy, California Environmental Protection Agency



Doing More through Coalition Partnerships

Coalitions that the CPB partners with provide the California Prune industry a voice and expand opportunities to advocate for issues such as water, pesticides, and MRL's adding political, technical and financial horsepower to our efforts.

- California Specialty Crops Council (board) www.specialtycrops.org
- U.S. Agricultural Export Development Council (board) www.usaedc.org
- Agricultural Research Institute (chair) www.calstate.edu/impact-of-the-csu/research/ari
- California Dried Fruit Coalition (co-chair)
- CDFA Marketing Executives Committee (executive committee)
- Buy California Marketing Agreement – CA Grown (board and committee) www.californiagrown.org
- Cal Poly, SLO, College of Ag, Food & Environmental Sciences (Dean's Council) cafes.calpoly.edu
- Agricultural Export Coalition
- Minor Crop Farmer Alliance
- European Federation of the Trade www.frucom.eu/contact
- International Prune Association www.ipaprunes.org
- International Nut & Dried Fruit Council www.nutfruit.org
- U.K. Nuts & Dried Fruit Trade Association (NDFTA) www.ndfta.co.uk
- Dried Fruit Alliance (Executive Committee)

United States



The United States is the **#1 global destination** for California Prunes.

As consumer behavior continues to change and new habits are formed, Americans continue to seek out photo-worthy foods that offer health and wellness benefits. Our public relations program in the United States underscores the remarkable health and nutrition benefits of California Prunes,

while serving up versatile ways to enjoy prunes in cooking, baking, and as a delicious everyday snack. The year-round program translates to a steady drumbeat of media coverage, social media engagement, and educational opportunities for registered dietitians and healthcare professionals.

ALL OUTREACH IS GEARED TOWARD BUILDING GREATER AWARENESS OF CALIFORNIA PRUNES THAT ULTIMATELY DRIVES CONSUMPTION.

62 articles

generated from ongoing earned media outreach

361 million

earned media impressions secured +112% from the previous year

66%

of all earned media coverage includes messaging that highlights a relationship between prune consumption and bone health

Getting Seen

Through consumer research, the CPB found that prunes aren't "top-of-mind" among U.S. consumers, with roughly 3 in 10 indicating that they'd buy them – "if I thought about them more." With a clear focus on building awareness, we seize opportunities that offer efficiency by using search engine optimization (SEO) insights and facts to carefully select influencers and plan content for digital marketing.



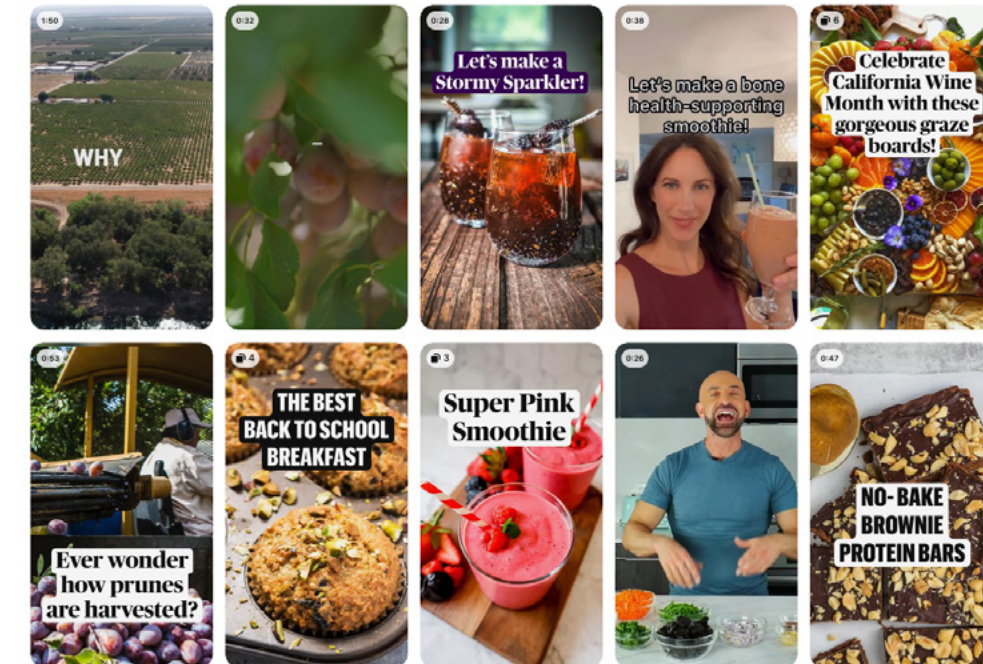
Pinning Down Engagement

Pinterest is the social media platform where people go to be inspired and find new recipes and it's also where we can evaluate trends for the United States, Canada and the United Kingdom. During the past year, our Pinterest channel reached more than 6.1 million potential consumers with eye-catching recipes and usage ideas. Leveraging trends, and taking a strategic approach to influencer relationships, the new content increased →



California Prunes

@CAPrunes
californiaprunes.org · Perfected from California sunshine, prunes support bone, gut + colon health. Follow us for fun facts, tasty ideas + delicious recipes...more
1.2k followers · 271 following
1.5M monthly views



IMPRESSIONS BY **44%**

ENGAGEMENT BY **57%**

AUDIENCE BY **26%**

ENGAGED AUDIENCE **40%**



Nutrition Roadshow

This past year, the CPB took the bone health story on the road as conferences resumed and healthcare professionals gathered once again. In the spring, Nutrition Advisor Andrea N. Giancoli co-presented with Dr. Shirin Hooshmand, whose research on prunes spans more than a decade, at the California Academy of Nutrition and Dietetics Annual Conference (CANDAC) in Oakland. The session reached local and regional registered dietitians and conveyed a comprehensive overview of the scientific evidence supporting the role of prunes in bone health and the nutrients and polyphenols in prunes thought to play a role.

In June, California Prunes expanded its healthcare professional outreach by sponsoring the 2022 Culinary Medicine Conference, “Health Meets Food” (HMF). The highly engaged audience included medical doctors and specialists, such as obstetricians and gynecologists, registered dietitians, registered nurses, and culinary instructors. Guest speakers, Dr. Connie Weaver, Distinguished Research Professor at San Diego State University shared the prunes bone health research story, and Leslie Bonci, MPH, RD, CSSD, LDN shared California Prunes health and nutrition tips along with a delicious California Prunes inspired lunch.



Expert Endorsements Take The Cake

California Prunes launched a special multi-pronged program with Cherry Bombe featuring culinary partner/influencer Bronwen Wyatt of Bayou Saint Cake to showcase prunes as an ingredient in baking and cake artistry. The program featured California Prunes on the popular Cherry Bombe podcast, the monthly newsletter, Instagram feed and stories, website, a baking demo by Wyatt during one of the monthly membership meetings, and a full-page ad in the Cherry Bombe magazine, reaching 74,000+ highly engaged, highly receptive food enthusiasts and chefs.

Driving Headlines with Research

Building relationships with targeted media and leveraging the latest nutrition research news, California Prunes broke through in all the right places with on-point coverage. With the release of six new research studies, nutrition research was a primary driver of highly favorable coverage while making the most of our long-time investment in nutrition research which was amplified to consumers and the health and nutrition community.

7 Food Staples to Add to Your Fitness-Focused Diet

Men's Health

Study Shows Prunes Increase Bone Density — Plus 3 Simple Strategies to Make Bones Stronger

Better Homes & Gardens

15 Foods that Help You Poop, According to Dietitians

Shape

The Anti-Inflammatory Food that Could Help Prevent Osteoporosis, According to Research.

Eating Well

Why Prunes Should be Your Go-To Holiday Snack

verywell

The #1 Best Food that Crushes Sugar Cravings, Says Dietitian

Eat This, Not That!

California Prune Board Releases Two New Studies

Food & Beverage Insider

9 Healthy Pre-Workout Snack Ideas to keep You Fueled (Not Full)

Real Simple

In Defense of Prunes

Eater

Eating Prunes Benefits Satiety, Weight Management

SF&WB

Japan

2021/22 Full Year Exports to Japan:

U.S. Market Share
(based on volume)

94%

(NO CHANGE)

% change in
U.S. Export Volume:

+4%

(YEAR-ON-YEAR)

% change in
U.S. Export Value:

+6%

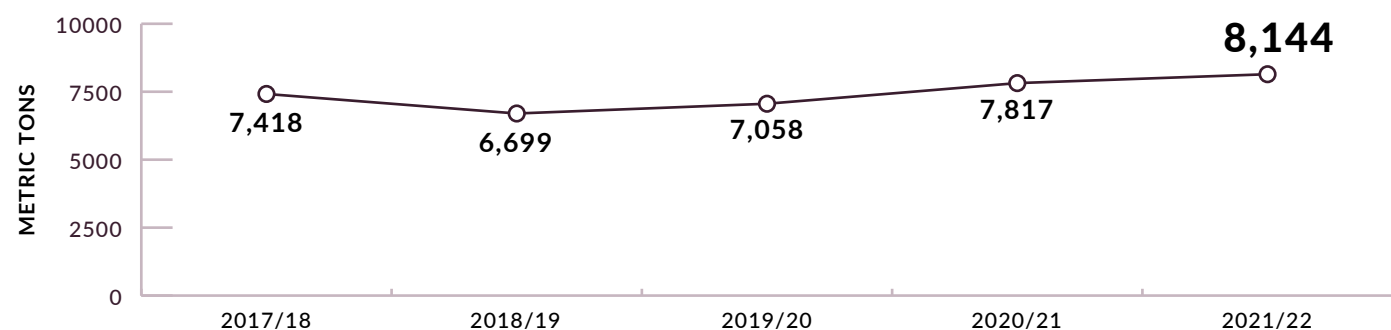
(YEAR-ON-YEAR)

Share of U.S. Global
Export Volume:

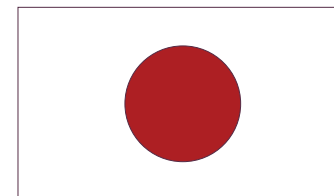
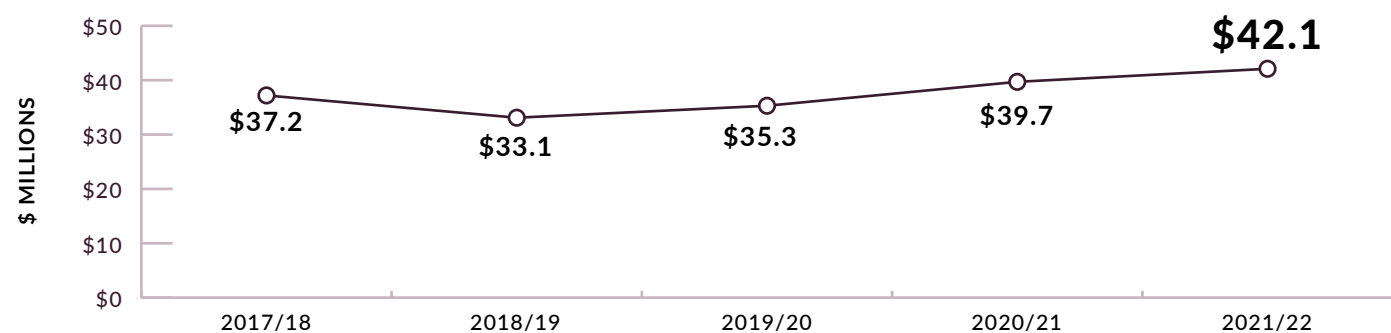
18%



U.S. Exports to Japan (Volume by Crop Year)



U.S. Exports to Japan (Value \$Millions)



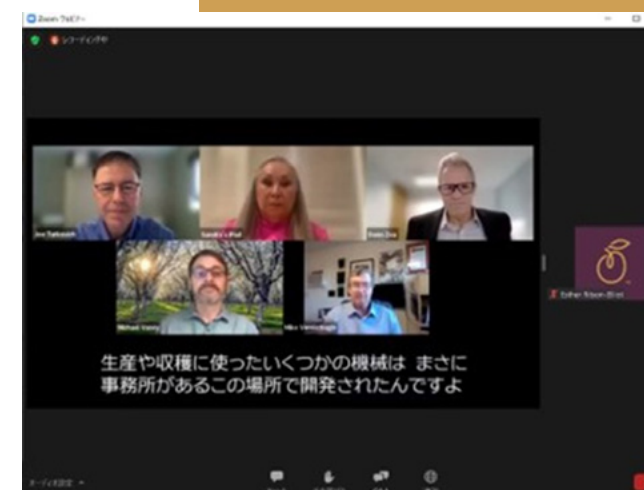
Maintaining demand for healthy snacks.

Japan is our top single export market and remains the most premium market for the CPB. With a strong trade reputation for quality and safety, California Prunes continue to reinforce the trade's enthusiasm by engaging with trade members and communicating the benefits of our partnership through consistent touch points. Prune purchase frequency among Japanese consumers remains strong with the primary reason the Japanese buy prunes is for health and satiety. To maintain our market share and underscore the health benefits, CPB programming bolsters awareness that California offers the most consistent quality and nutrition.

In spring, with borders still closed due to COVID-19, CPB adjusted tactics and hosted a trade e-seminar which brought together 75 trade members and media. California Prune growers and U.S. and Japanese nutrition presentations joined forces with messages from CPB leadership. Riding on the previous year's successful "Blessings of California" TV advertising campaign, CPB continued with autumn and spring flights of the TV commercial and integrated with digital and social media to reach new generations of consumers.



2021/22 Highlights Video



Italy

2021/22 Full Year Exports to Italy:

U.S. Market Share
(based on volume)

41%
(+22 POINTS)

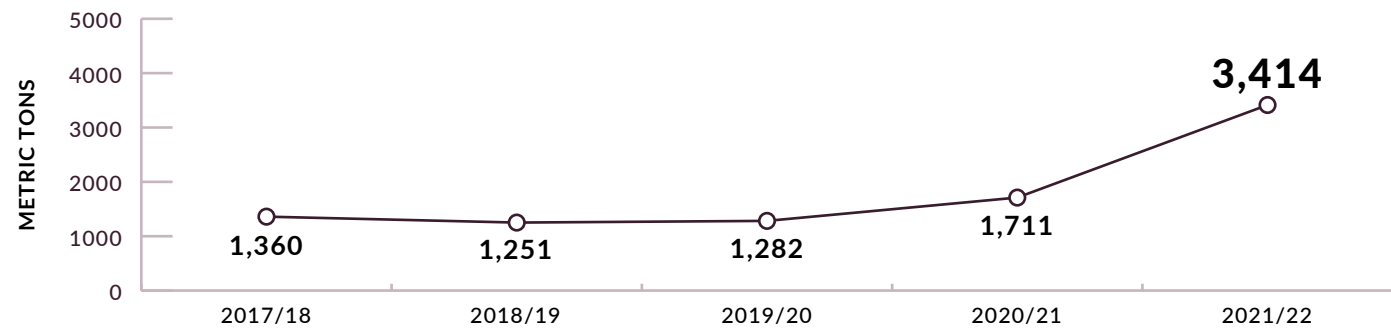
% change in
U.S. Export Volume:
+100%
(YEAR-ON-YEAR)

% change in
U.S. Export Value:
+77%
(YEAR-ON-YEAR)

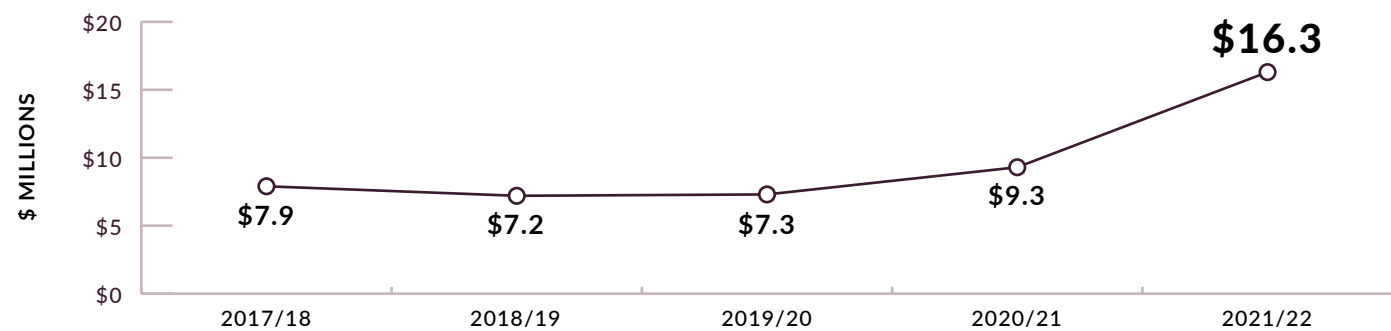
Share of U.S. Global
Export Volume:
8%



U.S. Exports to Italy (Volume by Crop Year)



U.S. Exports to Italy (Value \$Millions)



Reaching more people with relevance.

Italian consumers spend more for high-quality products and for products that promote health. Strengthening the premium positioning of the California Difference and continuing to build the bone health message is our number one priority, but consumers have increased attention to home cooking through the COVID era and there is growing attention to authenticity, sustainability, and overall wellness.

Throughout the holiday season, the CPB promoted cutting-edge culinary creations from Maître Chocolatier Stefano Collomb, featuring California Prunes in the mastery of his craft. Building a relationship with an important target who sees California Prunes as an ally and addressing the needs of their children, we partnered with the Mamma Che Club – the biggest network of moms in Italy. The FY 21/22 also expanded the nutrition advice video series called 'Video Pills' with Annamaria Acquaviva to share the benefits of California Prunes by offering practical tips for viewers.



2021/22 Highlights Video



Canada

2021/22 Full Year Exports to Canada:

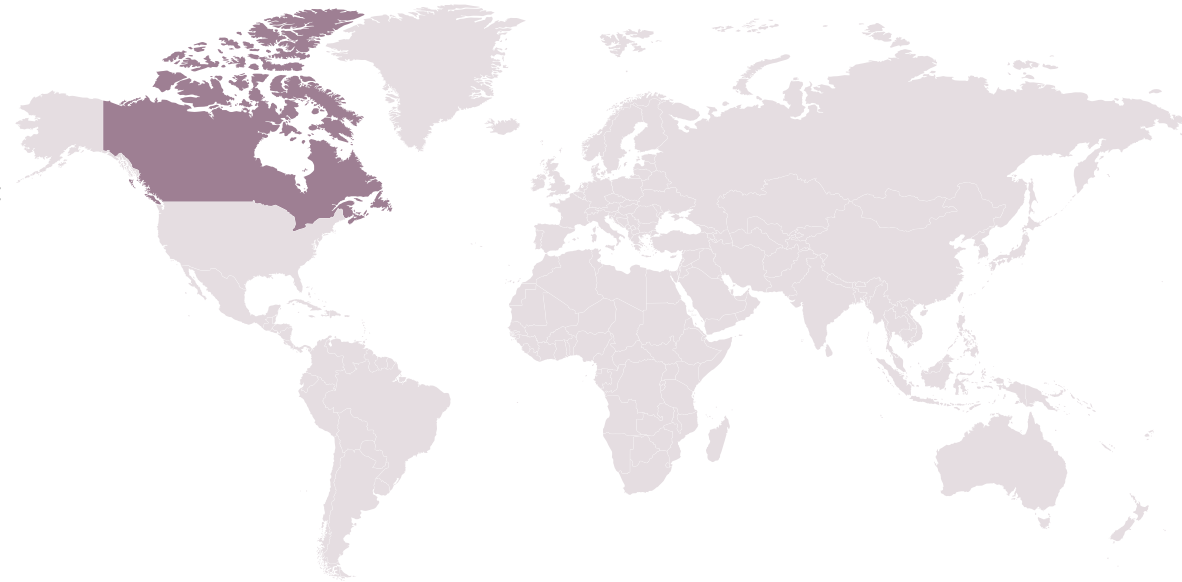
U.S. Market Share
(based on volume)

82%
(+9 POINTS)

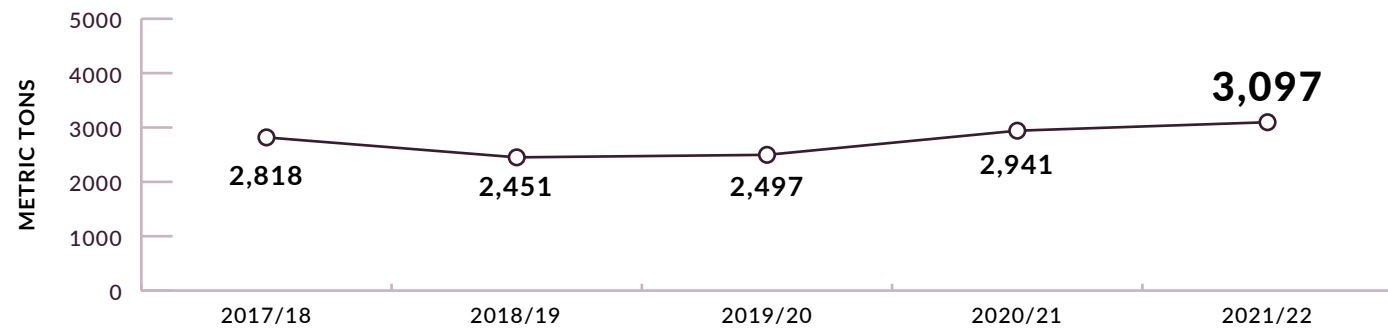
% change in
U.S. Export Volume:
+5%
(YEAR-ON-YEAR)

% change in
U.S. Export Value:
+17%
(YEAR-ON-YEAR)

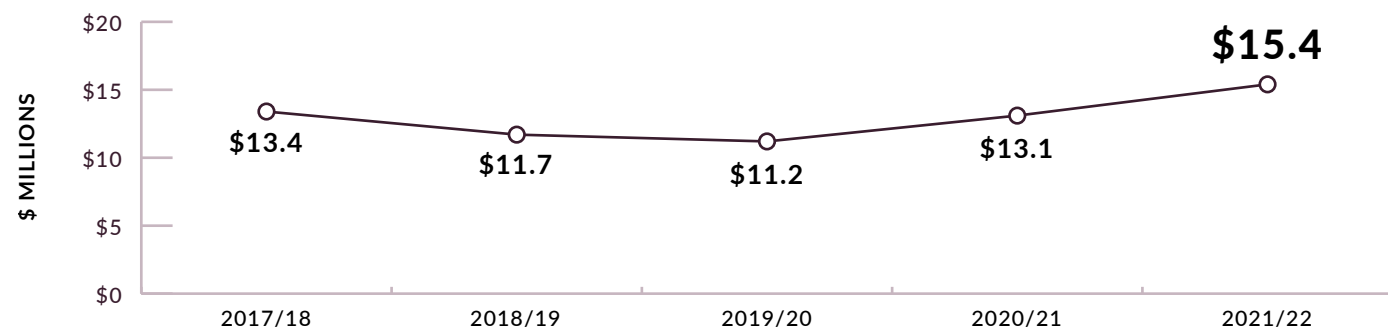
Share of U.S. Global
Export Volume:
7%



U.S. Exports to Canada (Volume by Crop Year)



U.S. Exports to Canada (Value \$Millions)



An athlete, at any age. A snack, at any age.

The Canadian market provides tariff-free access, few shipping challenges, and a consumer who recognizes California as a high-quality food producer, making this a continuous focus market for California Prunes. Canadians have an interest in foods that offer health benefits and 40% search online to find foods that will address a specific dietary need with gut health becoming top-of-mind for consumers. Our programs in Canada position California Prunes as a healthy “must-eat” snack, communicating the bone, gut, and fiber benefits to the broadest audience in meaningful ways while also targeting efforts to reach men and younger consumers.

Building on the successful TEAM UP campaign that leveraged Summer Olympic athletes as ambassadors, the program in FY 21/22 shifted to the Winter Games and the athletes in training to promote An athlete, at any age. A snack, at any age; California Prunes. *Prunes. For Life.* Heightening the awareness of the healthy snack proposition and creating enthusiasm as well as reminding Canadians that bone health is a lifelong journey, the campaign integrated media partnerships, social media, digital, and consumer sampling.



2021/22 Highlights Video

The California Difference

World-famous growing conditions make California Prunes the preferred choice of Canadian consumers as well as some of the country's top athletes.

"I love eating California Prunes mixed with my Greek yogurt and cereals in the morning. It gives me all I need for the day."
— Marion Thénault, Freestyle Aerial Skier

- 47%** of Canadians reported they would prefer to PURCHASE PRUNES FROM CALIFORNIA, USA than anywhere else*
- 60%** of Canadians reported they SNACK ON PRUNES monthly*
- 44%** of Canadians reported they PURCHASE PRUNES AT LEAST ONCE A MONTH*

TEAM UP with California Prunes

Canadian athletes on the world stage have teamed up with California Prunes to share the health and nutrition benefits of prunes, motivating consumers to flock to stores to purchase them as a snack on the go, an addition to their favourite meals, or as a sugar substitute in baked goods

Marion Thénault, Freestyle Aerial Skier

California Prunes can help contribute to...

- Strong Bones
- Healthy Gut
- Immunity
- Heart Health

Sign up for our newsletter for market updates and industry news that may be relevant for your business. If you are interested in purchasing California Prunes visit CaliforniaPrunes.ca/trade for a list of California Prune handlers.

CaliforniaPrunes.ca | @CAprunesCAN | Marion Thénault photos courtesy of Freestyle Canada.

China/Hong Kong

2021/22 Full Year Exports to China/Hong Kong:

U.S. Market Share
(based on volume)

43%
(+3 POINTS)

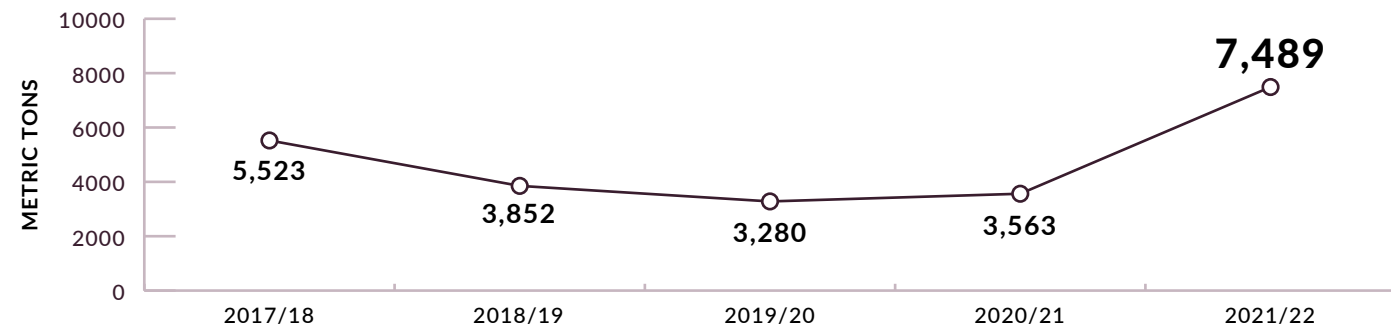
% change in
U.S. Export Volume:
+110%
(YEAR-ON-YEAR)

% change in
U.S. Export Value:
+108%
(YEAR-ON-YEAR)

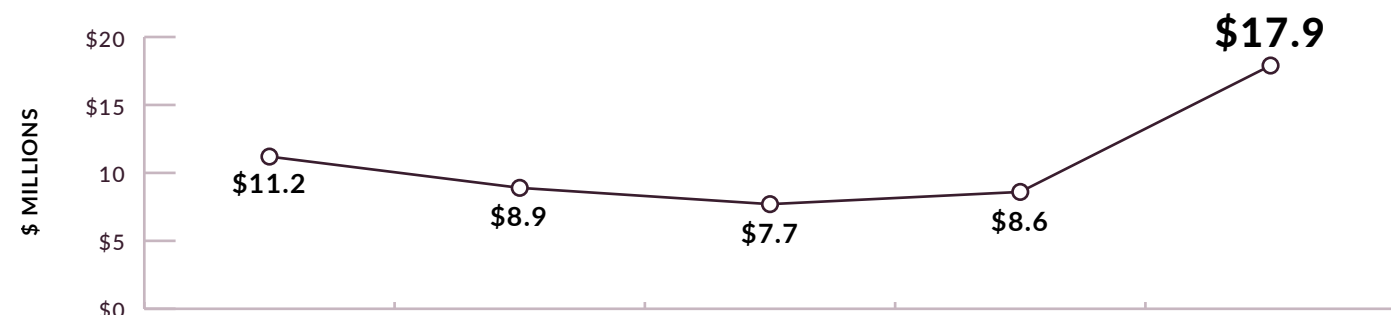
Share of U.S. Global
Export Volume:
17%



U.S. Exports to China/Hong Kong (Volume by Crop Year)



U.S. Exports to China/Hong Kong (Value \$Millions)



Pushing back in China/Hong Kong.

Despite unpredictable shipments and intense relations between the U.S. and China which have impacted tariffs, California Prunes saw a year of growth in China. Amid stiff competition from Chile who have the benefit of a zero percent tariff, California saw a reduction in tariff from 70% to 40%, showcasing the vigilance and agility our boutique commodity has in exporting product to China. California Prunes enjoys strong consumer perception in China, and we leverage our premium leadership to promote a shelf-stable product from a food-safe origin.

CPB's program in China and Hong Kong continues to strengthen ties with the trade and improve consumer confidence and loyalty by highlighting the California Difference and nutritional benefits with a focus on bone health. Like Japan, the CPB hosted a virtual trade seminar when safety was paramount and coupled this with nutrition updates to build relationships and garner new trade leads. To reach health-conscious audiences, samples were distributed at gyms and health clubs to further cement the health halo while Chinese influencers promoted California Prunes on Weibo, a popular Chinese social media app.



2021/22 Highlights Video



请接收我们来自加利福尼亚的问候！
美国加州西梅 始终致力于发展您的业务，并帮助您满足客户的需求。我代表美国加州西梅，感谢中国大陆和香港的买家们一直以来的支持。
尽管持续的疫情给我们带来了挑战，但美国加州西梅对中国的西梅出口量依然增加了14%。2020/21 年度，美国在中国西梅市场占有率有了41%的市场份额。
作为美国环境和生物多样性最丰富的州之一，加利福尼亚州以持续生产世界最优质西梅而享誉百年。每年，我们的种植者都遵循优良的农业方法和先进的生产和管理，来确保西梅的质量和口感始终如一。



“
Greetings
from
California

美国加州西梅种植者的专业知识能确保每份水果都在最佳大小和最佳的最佳状态下采摘，并充满甜味和风味。正是这种独特的风味使美国加州西梅作为美味的点心，给人们带来愉悦。同时，它们不仅能为菜肴带来新鲜的味道，而且烘焙食品增添了甜味和奶油般的风味。

中国一直是美国加州西梅的重要市场。随着在中国的持续营销计划和与西梅健康益处持续研究持续开展，我们相信加州西梅在2022 年及更远的未来将继续受欢迎。

我们感谢您的支持，并期待与您建立成功的长期合作关系。

Donn Zea
执行董事

United Kingdom



2021/22 Full Year Exports to U.K.:

U.S. Market Share
(based on volume)

15%
(-3 POINTS)

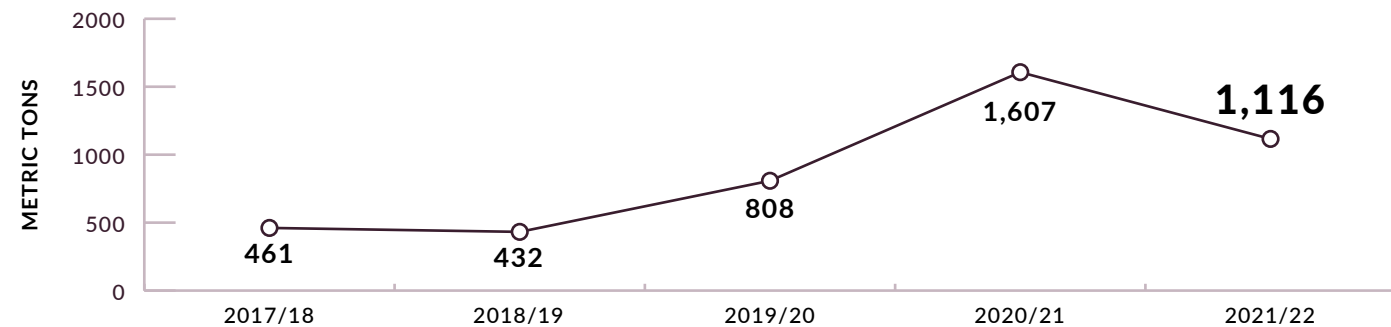
% change in
U.S. Export Volume:
-30.5%
(YEAR-ON-YEAR)

% change in
U.S. Export Value:
+10%
(YEAR-ON-YEAR)

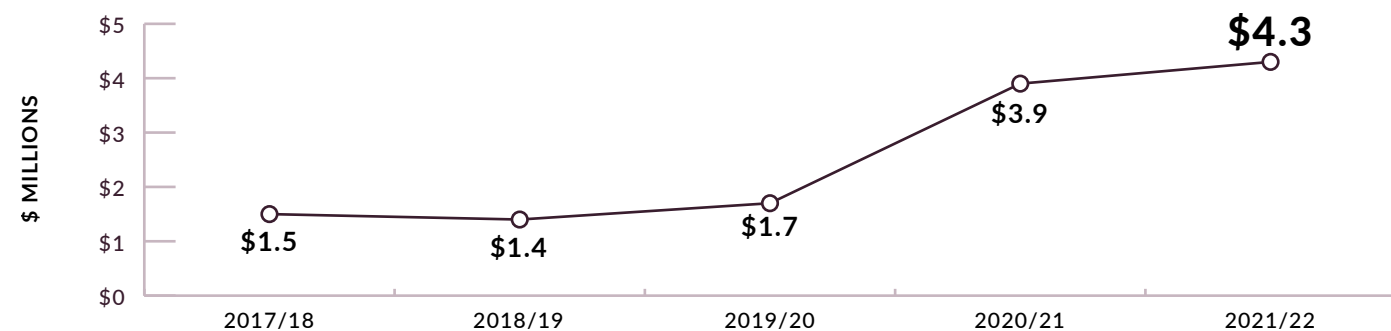
Share of U.S. Global
Export Volume:
2%



U.S. Exports to U.K. (Volume by Crop Year)



U.S. Exports to U.K. (Value \$Millions)



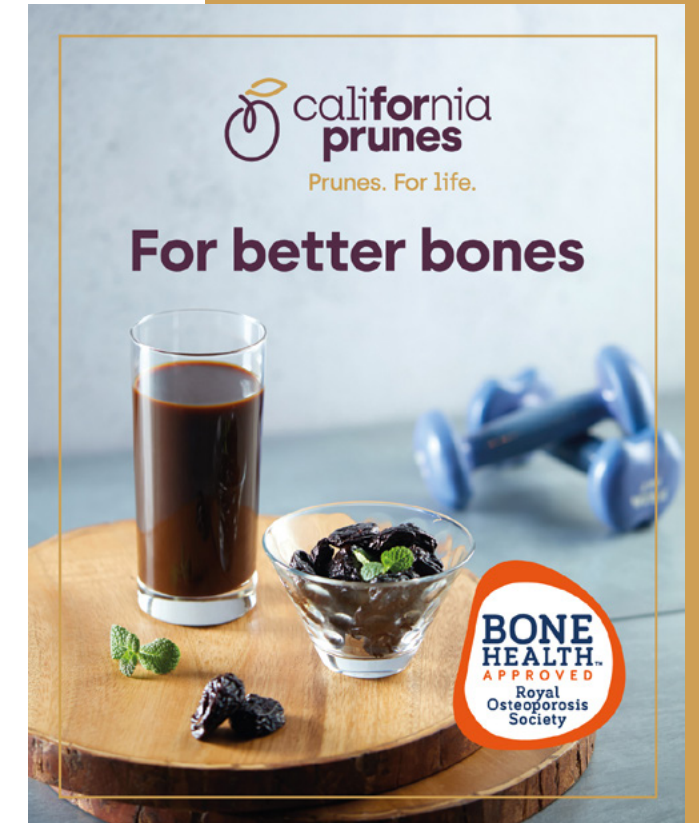
A Hub for English-Speaking Global Trade Media

With established long-term trade relationships already in place and a 0% tariff, the CPB continues to focus on trade communications in the UK as a hub for English-speaking global trade media in this large, dried fruit consuming market. Our program in the UK drove visibility of California Prunes at a critical time in the UK's trading environment: the new post-Brexit and post-COVID environment with the possibility of a recession on the horizon.

To reinforce the premium position of California Prunes with trade members, activities maintained the course with attendance at important trade shows while building a regular presence on LinkedIn. Building on the investment in bone health research and leveraging stakeholder partnerships, the CPB developed a relationship with the Royal Osteoporosis Society making California Prunes the first food in the UK to be accredited a "Bone Health Approved" logo.



2021/22 Highlights Video



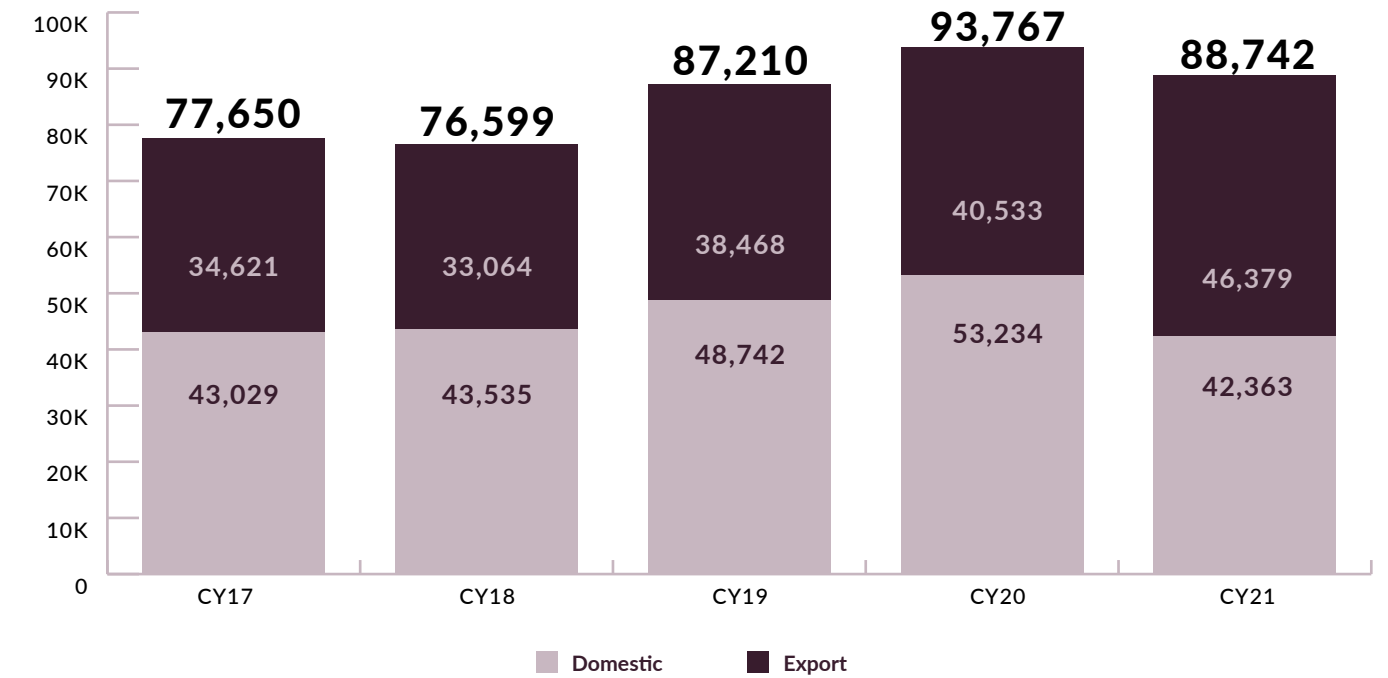
Section 3:

FACTS & FIGURES

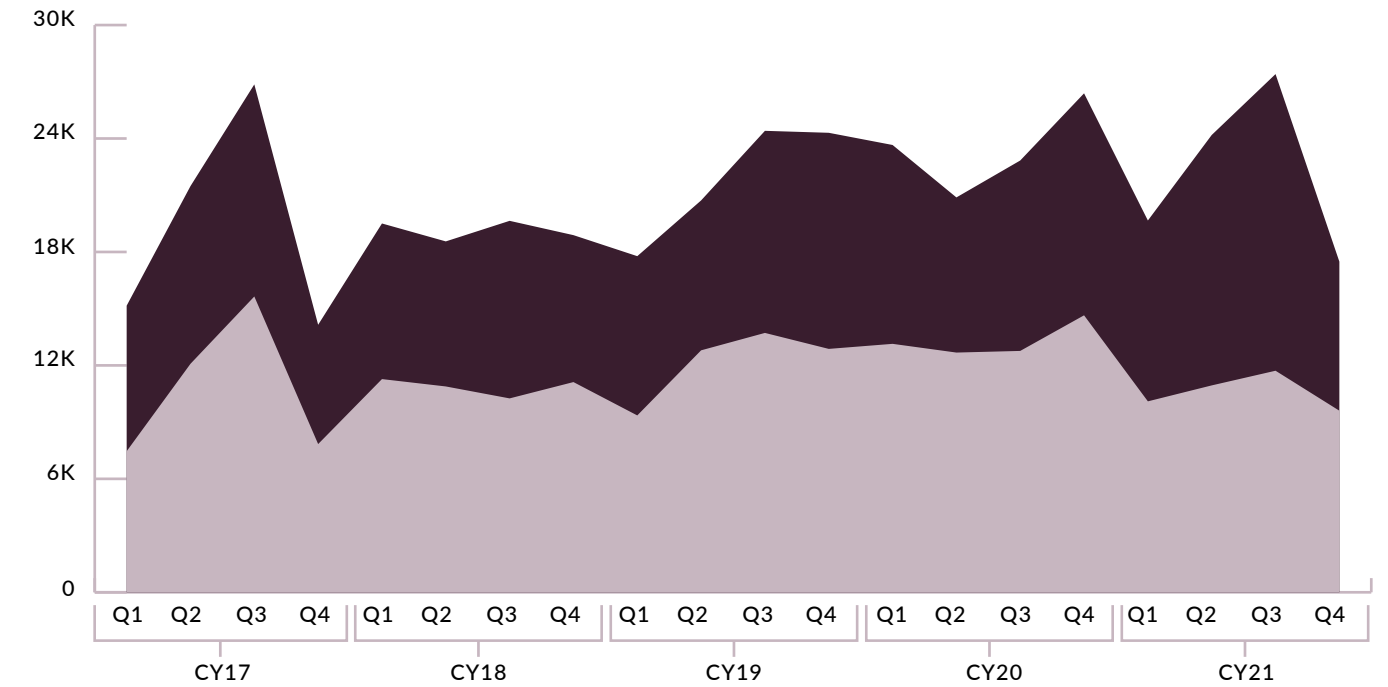
California Prune Supply, Shipments, Beginning & Ending Inventories



California Prune Shipments



California Prune Shipments by Quarter



Get more on Reports & Resources page
 Email klocy@californiaprunes.org for the password



Average Grower Returns

\$1,980
2017/18

\$1,912
2018/19

\$1,801
2019/20

\$1,869
2020/21

\$2,101
2021/22

Source: USDA, NASS Walnut/Raisin/Prune
Report State Summary



Total Prune Acreage

51,242
45,427 bearing | 5,815 non-bearing
2017/18

48,571
43,463 bearing | 5,108 non-bearing
2018/19

46,373
40,509 bearing | 5,864 non-bearing
2019/20

40,994
35,615 bearing | 5,379 non-bearing
2020/21

41,275
36,818 bearing | 4,457 non-bearing
2021/22

Source: CPB processor reports

Prune Tree Sales

263K
2020

229K
2021

162K
2022

2021 Total Production

81,950
SHORT TONS

2022 Carry-In Inventory

37,000
SHORT TONS

2022 Natural Condition Supply

112,000
SHORT TONS (projected amount)

The Board's estimate of 75,000 plus the carry-in inventory of 37,000

Section 4:

CALIFORNIA PRUNE BOARD RESOURCES

Resources



NEWSLETTER SIGN UP:

- Orchard Notes: Grower-focused with crop information
- Positively Prunes: Broader industry updates
- Prunes. For Life.: Nutrition focused



UC ANR IPM:

- Resource for the Integrated Pest Management recommended by UC ANR.



FRUIT & NUT RESEARCH & INFORMATION CENTER:

- A database of past prune research reports and resources



CALIFORNIA PRUNES IN THE NEWS:

- See how prunes are gaining media traction and stay up-to-date on press releases.



MEETINGS:

- List of industry meetings and events.



INDUSTRY REPORTS AND RESOURCES:

- Annual Statistical Report
- Production Research Reports
- Inventory and Shipment
- Exports by Country
- Brand Resources & Asset Library



PRUNE SUMMIT

REGISTER TODAY!

WHEN:
MARCH 23, 2023

WHERE:
Orchard Creek Lodge
Lincoln, CA



Futureproofing the California Prune Industry

We Are Here for You – Connect with Us!

We welcome any feedback or any questions you might have about the CPB activities. Please reach out anytime. Sign up for our regularly distributed newsletters and follow us on our various social media channels for ongoing news, updates, and inspiration about the many wonders of California Prunes.



Ensure you're getting all the latest information from the CPB staff throughout the year

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CAprunes



CAforPrunes



CAforPrunes



CaliforniaPrunes

